NHS Education for Scotland

**ePortfolio:** User guide for Foundation programme trainees – 2012 Curriculum Updated for 2012-2013 training year

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# User guide for Foundation Programme trainees
**Version 5.0**

# 1 Introduction

This user guide explains the step-by-step process to correctly completing your electronic portfolio (ePortfolio), which is required to demonstrate your progress though your Foundation Training Programme.

**This user guide will offer you advice on:**

- How to use the ePortfolio system
- How to complete your ePortfolio

**It will also mention useful topics, such as:**

- What is to be completed by you and your Supervisor(s)
- What to include as evidence in your ePortfolio
- Who can support you with ePortfolio queries

You need to regularly add relevant evidence to your ePortfolio and use it not just as a record of progress but also as a learning tool to encourage the development of good practice.

**Note:** *Not all Deaneries have the same processes and the names and types of forms used can vary between Deaneries. Please bear this in mind when reading through the User Guide, as it has been designed for generic use.*

## 1.1 Why has this guide been updated for the 2012-13 training year?

This Guide has been updated to reflect the changes to the Foundation Programme ePortfolio being released for the 2012-13 training year.

The UK Foundation Programme Office (UKFPO) Foundation Programme (FP) Curriculum Delivery Group required these changes to the ePortoflio to represent and support the new 2012 Foundation Training Programme Curriculum.

# 2 Using the ePortfolio System

## 2.1 Getting Started

### 2.1.1 Receiving your ePortfolio account details

In order to log on to the Foundation ePortfolio you will need your username and password.

In the first instance this will be provided by your Deanery or Foundation School administration staff.

You will receive a user name and password directly from the administrator either via email or on paper.

If you have not received your username and password please contact your Deanery, Foundation School or local Postgraduate Centre office.   The ePortfolio technical provider is not able to give out log ons.

### 2.1.2 Logging in

Open your internet browser i.e. Internet Explorer, Firefox etc. and enter www.nhseportfolios.org  in the address bar. On the right side of the screen a user login box is displayed - enter your username and password in the appropriate fields and click on the Log In button.



When you log in to ePortfolio for the first time you will be prompted to change your password (you will also be prompted to verify that your e-mail address is valid).

If you want to change your password again at a later date, you can do this by clicking on the Profile drop down menu and selecting Personal Details. Enter your old password and then enter your new, memorable, password twice in the appropriate fields.

### 2.1.3   Glossary of terms

**Trainee -** The primary user of the ePortfolio.  In this case a Foundation trainee.

**Roles -** There are three principal roles on the Foundation ePortfolio, that of the Trainee, Supervisor and Administrator.  Each role views the ePortfolio system differently and can perform different functions dependent on their role.

**Sites -** These are the main ePortfolio types currently; Foundation, Physician, CEM, Pharmacy, RCR, RCPCH, Nursing and RCOG.

**Locations** - These refer to physical (i.e. real) locations, most commonly hospitals, or may also refer to administrative offices or schools, for example, an NHS trust.

**Training Programme** - This represents the overall programme of training for a trainee.   For the Foundation Site the programme will almost always be 'Foundation Training'.  Programmes also have a location associated with them.

**Post/Placement** - A post fits into a Training Programme and represents a particular period of training and is used as the object to save forms and other information against.  The post has a grade/designation defined, as well as a location.  The new approved term for a post is a placement. The ePortfolio will be moving towards this new terminology over the next few months, so you may see both terms used.

**Grade/designation** - This refers to a trainee's stage of training, such as FY1, FY2, ST1, FTSTA1, etc.

## 2.2  The Header bar

Each ePortfolio user has a unique 'header bar' seen at the top of the page.

| Testing QA-found-trainee    Foundation Trainee    Foundation Programme W3    Royal Infirmary of Edinburgh (01 Apr 2011 to 31 Jul 2011)    Change Role/Programme/Post | Logout |

It contains a summary of information about your account.  Included in the header (left to right) are:
- Name of logged in user
- Selected Role
- Current Programme
- Current Post

As well as this there are two action links:
- Change Role/Programme/Post – In future this will allow you to restrict the information you view on your ePortfolio to a particular post or programme (I.e. You will not see data for previous post if you want).  However this is still in development and at present this feature will not change anything on the Foundation Site.
- Logout – Enables you to log out of your ePortfolio account.

## 2.3  The Home Page

Below is the **Home Page** - it is the first screen you will see after the **Information Broadcast** page (used by the ePortfolio team to communicate with users).

The home page acts as a 'dashboard' for the ePortfolio and many other parts are either summarised here or can be accessed from it.

### 2.3.1   Alerts

This is a facility for Deanery or local administrators to enter alerts on any information/news/announcements they have.

### 2.3.2   Courses and Seminars

This is a facility for administrators to enter information on courses and seminars.

### 2.3.3   Show my recent Activity

Click this link to indicate recent activity that relates to a trainee's ePortfolio account, and includes recently added, updated, signed, or commented forms, PDPs, and logs.  The top ten recent activities in your account will be displayed.

### 2.3.4   Last Login

As a security feature the date you last logged in on and the browser you used will be displayed on your home page.  If the date or browser are not what you expected please contact ePortfolio support (see section 2.11.4 for details of how to do this).

### 2.3.5   Your current post

This provides details of your current post including dates of service and details of any specialties.

### 2.3.6   Recent messages

Your home page is linked to the ePortfolio messaging system (see section 2.10).   Recent messages form the last seven days will be displayed here so that it is easier for you to see when there are new messages.    This list is restricted to showing the five most recent messages so you should always check your messages section as well.

### 2.3.7 Form Status

The key forms to be completed for each post are now displayed on the home page so that you can keep track of them and access them more conveniently.   The status shows a tick if one or more form exists on the current post.   Each form will have a variety of actions available depending on the status of that particular form.

Actions available:
**View** – If the form has been completed for the current post it will be available to view by clicking this link.
**Create** – if the form is not present then the option to create the form will be presented.  Note: see sections 2.7.2.1 and 2.7.3 for details on the appropriateness of self entered forms).
**Ticket** – If the trainee does not have rights to create a form but can issue a ticket for it (see section 2.7.5 for details) you can move directly to the ticket request page.

(Please note: The list of key forms is as defined by the UK Foundation Programme Office.  Your specific requirements for each post may differ by deanery.  See section 3.2 for more details on what is necessary to include in your ePortfolio.)

### 2.3.8 All posts in current training programme

This area displays all posts and supervisors in your current training programme, displaying post dates, locations and supervisors.  It also provides a quick way to directly message a supervisor.  Click the 'Send message' link next to each supervisor to take you to a message pre-populated with that person's name.

### 2.3.9 Quick links

This provides quick, direct links to areas you may need to access on a regular basis. (Not shown on screen shot above).

## 2.4  The Navigation Menu

The site is divided into seven sections and there is a drop down menu for each one. If you click on the menu header e.g. **Reflection**, you will be taken to that section where you can see all items within it and a description of what each one is used for.

Alternatively, you can simply choose the item directly from the drop down menu.



The seven sections are;

- **Home** – you can view and make changes to your personal details, view your declarations and agreements, and access the 'download portfolio' page

- **Curriculum and PDP** – you can view your curriculum and link evidence forms to specific outcomes

- **Forms** – you can view the various electronic forms that are stored in your ePortfolio

- **Reflection** – you can record or review reflective information such as Educational Logs or identify further learning needs

- **Additional Achievements** – you can use this section to record additional achievements not dictated by the core curriculum

- **Messages** – you can send/receive internal messages regarding ePortfolio

- **Help** – you can access help and support information on ePortfolio 11

We will look at each of the seven sections in more detail later…

- **Help** – you can access help and support information on ePortfolio

## 2.5  The Home Menu

There are eight pages found in the Home Menu. Let's take a look at what each menu item is used for:

### 2.5.1   Summary Overview

This is a summary of all the electronic forms available for your current and previous posts. You can view forms that have been submitted or create new forms, where appropriate.



| Type | Form | Submissions | |
|------|------|-------------|---|
| | **FY1 - Royal Infirmary of Edinburgh - West - Clinical Genetics (01 Apr 2011 to 31 Jul 2011)** | | |
| | Core Procedure | 🔍 1 Submission | ✎ Create |
| | Mini-clinical evaluation exercise (CEX) F1 | 🔍 2 Submissions | ✎ Create |
| | Direct observation of procedural skills (DOPS) F1 | 🔍 1 Submission | ✎ Create |
| | Case-based discussion (CbD) F1 | - | ✎ Create |
| | Developing the clinical teacher assessment (F1) | - | ✎ Create |
| | Summary TAB | - | ✗ |
| | 360o Team assessment of behaviour (TAB) | - | ✗ |
| | Self TAB | - | ✎ Create |
| | Induction meeting with Clinical Supervisor | 🔍 1 Submission | ✎ Create |
| | Initial meeting with Educational Supervisor | - | ✎ Create |
| | Combined: Induction meeting with Clinical Supervisor & Initial meeting with Educational Supervisor | - | ✎ Create |
| | Mid-placement review | - | ✎ Create |
| | End of placement review | - | ✎ Create |
| | Mid-year review of progress | - | ✎ Create |
| | Additional Action Plan | - | ✎ Create |
| | Clinical Supervisor's Report | - | ✗ |
| | Attendance | - | ✗ |

### 2.5.2   Personal Details

You can view and edit your personal details here, for example your name, e-mail address, and you can upload a photo too (the photo will be visible to those users who can view your portfolio and those using the ticketing facility). You can also change your password and username here.

### 2.5.3   Post / Supervisor Details

You can review your current Post or Supervisor details.   These are set up by your Deanery, Local Trust or Hospital Administrators depending on the common practice in your region. Please note that the central ePortfolio team do not conduct these activities; if your details are incorrect please contact your local support network.

### 2.5.4   Declarations and Agreements

Here you can view and sign your educational agreements and health and Probity declarations that are required by your training year programme.

These forms should be signed by the trainee with the first three weeks of starting their training year programme. To sign a form click on the blue form name to open, check the **Sign as…** box and click save.

You will need to sign three forms for each of your Foundation Training Years. The three forms are;
- Conditions of taking up a training post / Educational agreement
- Probity Declaration
- Health Declaration

At the start of each training year you will be required to sign all your educational agreements and health and probity declarations for that period before you continue with your ePortfolio. If you have not signed these forms, you will be redirected to this page every time you log in.

### 2.5.5    Download Portfolio

You can download and save a PDF containing a snapshot of any ePortfolio information you select, at the time you create it. You could then use this as evidence for interviews/assessment, for example. You can select which parts of your ePortfolio you wish to download from a list of available items (you will have to select your current post or training period from the drop-down menu to view items). To select an item check the tick box next to the item and click the **Add Item** arrow between the two boxes to add it to the right hand box. You can also click the **Select All** link to move all the items at once.

Once all the items that you want to include in your PDF are in the left hand box, click the **Make PDF** button to generate the PDF.



Once generated the PDF will be added to your list of **PDFs Available for Download** (see below). The list will include details such as the date that the PDF was created. From this list you have three further options; you can **Delete** or **Edit** the PDF by selecting the relevant link. You can also select to **View** the PDF, this will download and open the PDF in a new window using your computer's standard PDF viewer.

**Download Portfolio**

Below are the Portfolio Downloads on file for this account. These are PDF files that contain a snapshot of the ePortfolio information you selected at the time it was created.

Select items from my ePortfolio to make into a PDF...

**PDFs Available For Download**

| | Files | Description |
|---|---|---|
| ✗Delete  ✏Edit  🔍View | 2010-07-16_103709.pdf ⭐<br>*Size: 130 KB* | |

*Files with a ⭐ next to them were generated today.*

### *2.5.5.1  Printing your ePortfolio*

Downloading your ePortfolio to a PDF format is the only reliable way of formatting the contents of your ePortfolio in a manner that will enable you to print without error.  For data security reasons only the trainee can download and print out the contents of their ePortfolio.

## 2.5.6   Courses and Seminars

This section is linked to the Course and Seminar notification bar on the home page.  When an administrator enters details of a course or seminar in your region an outline will appear on the home page in the blue **Courses and Seminars** bar.   If you click the **View All Courses & Seminars** link on the home page, more details about course and seminar information that would not fit in the short notification will appear on the Courses and Seminars page.

It is not unusual for this page to display no information.

Please note:  This page is not editable by a trainee, if you wish to record attendance at teaching or reflect on teaching content this can be done in the **Courses and Seminars Attended** page of the **Additional Achievement** menu or in the **Reflective Practice** section of the **Reflection** menu.

## 2.5.7   My Filled Forms

In this section of your ePortfolio you can view a list of all the forms that you have filled in across the entire ePortfolio system.

Any forms that you have completed will be listed as its own entry.  You can modify the way in which your list of forms is displayed (10, 25 or 50 forms viewed per page) and sort by various different criteria selected from the **sort by** drop-down menu.

## 2.5.8   Absences

Some training programmes require you to document time taken away from your programme so here you can record any absences that have taken.

## 2.6  The Curriculum and PDP Menu

The Curriculum Menu of the ePortfolio is where you can view the **Foundation Curriculum** and associate items from within your ePortfolio to progress towards achieving the competencies outlined in the curriculum. You can also add comments and ratings here.

| Competencies | | | | Expand All |
|---|---|---|---|---|
| **Outcome** | **Evidence** | **Trainee Rating** | **Ed Sup Rating** | **Overall Ed Sup Rating** |
| ⊞ 1 Professionalism | 0 links | (0/6) | (0/6) | |
| ⊞ 2 Relationship and communication with patients | 1 links | (0/6) | (0/6) | |
| ⊞ 3 Safety and clinical governance | 0 links | (0/3) | (0/3) | |
| ⊞ 4 Ethical and legal issues | 1 links | (0/4) | (0/4) | |
| ⊞ 5 Teaching and training | 0 links | (0/1) | (0/1) | |
| ⊞ 6 Maintaining good medical practice | 0 links | (0/3) | (0/3) | |
| ⊞ 7 Good clinical care | 1 links | (0/10) | (0/10) | |
| ⊞ 8 Recognition and management of the acutely ill patient | 2 links | (0/7) | (0/7) | |
| ⊞ 9 Resuscitation and end of life care | 0 links | (0/3) | (0/3) | |
| ⊞ 10 Patients with long-term conditions | 0 links | (0/6) | (0/6) | |
| ⊞ 11 Investigations | 0 links | (0/1) | (0/1) | |
| ⊞ 12 Procedures | 0 links | (0/16) | (0/16) | |

### 2.6.1   Linking evidence



To link evidence to a competency, click on the **Link Evidence** icon.   This is the blue icon found on the right hand side of each listed competency.

Link Icon

You can link Assessments, Logs, PDPs, Self Appraisals, supervision/meeting form, certificate or file in your personal library.

Each competency can have any number of links, and each evidence item can be linked to any number of competences.

Once generated links can be displayed by clicking on the link icon for a second time. Links can be deleted from a competency by clicking on the delete button adjacent to the link (circled above). Note that this just deletes the link; the saved form itself is unaffected.

### 2.6.2  Trainee ratings and comments

The Curriculum outcomes (1-16) presented here can be expanded, either one at a time using the + symbols. Expanding the categories reveals the outcome subheadings, each which is represented by a blue text **subheading link.**



By clicking on the **competency link**, for example, 1.1 **Behaviour in the workplace**, you can view the following information:

- The outcome of successfully achieving the competency

- The knowledge and attitudes/behaviours that need to be demonstrated in order to successfully achieve the competency

- The core skills required in order to successfully achieve the competency at both **F1** and **F2** levels

You can add a rating (**Not achieved, Some Experience, F1 Level Competent, F2 level Competent**) and any comments.  Your comments and ratings will appear under the subheading and will be labelled as being trainee generated.
Your Supervisors/Programme Directors can also do this – they will be labelled as entered by that individual.

If evidence has already been linked to a competency (as circled above), you can view this by clicking on the **magnifying glass** icon next to it.

### 2.6.3   The curriculum overview 'traffic light' status overview

| Evidence | Trainee Rating | Sup Rating | Overall Ed Sup Rating | |
|---|---|---|---|---|
| 3 links | 🔴 (3/3) | 🟢 (2/3) | Partially met ▾ | 🟡 (A) |
| 1 links | ❓ (1/6) | 🔴 (3/6) | ▾ | ❓ |
| 0 links | 🟢 (1/10) | ❓ (0/10) | Fully met ▾ | 🟢 (G) |
| 1 links | ❓ (0/2) | 🟢 (2/2) | Fully met ▾ | 🟢 (G) |
| 0 links | ❓ (0/1) | 🟢 (1/1) | Fully met ▾ | 🟢 (G) |
| 0 links | ❓ (0/2) | ❓ (0/2) | ▾ | ❓ |
| 0 links | ❓ (0/5) | 🟢 (1/5) | ▾ | ❓ |
| 0 links | 🟡 (1/1) | ❓ (0/1) | ▾ | ❓ |
| 0 links | ❓ (0/1) | ❓ (0/1) | ▾ | ❓ |
| 0 links | ❓ (0/5) | ❓ (0/5) | ▾ | ❓ |
| 0 links | ❓ (0/4) | ❓ (0/4) | ▾ | ❓ |
| 0 links | ❓ (0/3) | ❓ (0/3) | ▾ | ❓ |
| 0 links | ❓ (0/1) | ❓ (0/1) | ▾ | ❓ |
| 0 links | ❓ (0/2) | ❓ (0/2) | ▾ | ❓ |
| 2 links | ❓ (0/15) | ❓ (0/15) | ▾ | ❓ |
| 0 links | ❓ (0/1) | ❓ (0/1) | ▾ | ❓ |

The curriculum overview contains a number of indicators that track your progress through the curriculum that translate the outcome sub heading ratings to a red-amber-green coloured indicator.

The indicators will indicate the number of ratings made and give coloured icons to summarise the ratings made by both the trainee and the Educational Supervisor.

There is also a 'manual' Overall Educational Supervisor Rating that can be set from their account.

What each indicator means is presented in the table below:

| Status type | Consideration | Status |
|---|---|---|
| Evidence | Number of evidence items | Number |
| Trainee rating | No Trainee rating | Grey |
| | Trainee has self-rated some items 'not met' | Red |
| | Trainee has self-rated some items 'some experience' | Amber |
| | Trainee has self-rated some items 'F1/F2 level competent' | Green |
| Educational supervisor assessment of individual competencies | No supervisor rating | Grey |
| | Supervisor has self-rated some items 'not met' | Red |
| | Supervisor has self-rated some items 'some experience' | Amber |
| | Supervisor has self-rated some items 'F1/F2 level competent' | Green |
| Educational supervisor assessment of trainees achievement of the desired outcome (Overall Ed Sup Rating) | This should be manually set based upon the supervisors judgment of the overall evidence presented | |
| | No selection made | Grey |
| | Manual selection of 'Not been met' | Red |
| | Manual selection of 'Partially met' | Amber |
| | Manual selection of 'Fully met' | Green |

Important: The lowest rating (Red being lowest) of any sub heading will be displayed as the overview i.e. if 19 sub items are green and 1 is red, red gets displayed.

The Supervisor rating column statuses are not dependent on Clinical Supervisor Ratings (though they can rate on the curriculum).  They are dependent on Educational Supervisor ratings and it is envisaged that these will make up almost all of the valid ratings.  However any rating left by your Foundation Programme Director will also count towards the ratings.

## 2.6.4   Requirements of competency sign-off

Although all trainees and all Educational Supervisors have the ability to sign off curriculum outcome sub headings and the overview shows the numbers of ratings made on the status indicators, the requirements to use these tools depend on local Deaneries and Training Programme guidelines.

Different programmes may or may not require these sign-offs each year. Therefore you and are your supervisor may not be required to sign of curriculum outcome sub-headings at all.

If in doubt speak to your Educational Supervisor, Training Programme Director, Foundation School or Deanery contact to be certain what their requirements are.

## 2.6.5   The e-LFH and UKFPO curriculum toolkit curriculum link icons

The ability to access associated training eLearning modules from within the curriculum has been added.

Where there is an available e-Learning for Heath training module for a given curriculum outcome sub-heading you will see the following icon:



For example Outcome 11 has an icon for all four sub-headings.



Clicking on the icon will take you an information box as demonstrated below.



There is a link to access the e-LHF training website.  The link will navigate you away from the ePortfolio and take you to the **entirely distinct** e-LHF website.  You will have to create and log into an account for this website separately.

There is also a list of appropriate topic codes for the e-learning module that pertain to the particular curriculum item that you use as reference to find the relevant module.

At the top of the curriculum page is a link to take you to the Foundation Programme Curriculum Resource Kit PDF document.   This additional resource aims to primarily assist foundation doctors in improving their knowledge and understanding of the generic and clinical topics as set out in the Foundation Programme Curriculum 2012.  Clicking the link on your ePortfolio will automatically open the PDF for you to read.

### 2.6.6   Personal Development Plan

This can be used at the start of a placement to set out when and how you will demonstrate proficiency in this competency as required by the 2012 Foundation Programme Curriculum.

The Personal Development Plan (PDP) is your chance to identify learning objectives for a particular time period.  It should be developed in conjunction with your supervisors and can be referred to during your training.

The PDP should be reviewed at the initial meeting. You should identify your learning objectives, outline the plan for the objectives to be met, and give an indication of the timescale for the objectives and an idea of how evidence for the completion of the objective will be achieved. These should be agreed with your Supervisor. Once objectives have been achieved, they can be ticked off. They will remain on the PDP to reflect your achievements throughout training.

To access an existing **PDP**, click on the **Curriculum and PDP** menu and then select **Personal Development Plan**.



Click on the title to view a **PDP** entry, or place a tick in the **Show Details** checkbox to get an overview. You can also edit or delete the entries. You can add a comment or signature to it by clicking on **Links** - the comments will be displayed at the bottom of the entry and they are visible to all who you choose to have access to it.

If you want your Supervisor(s) to be able to view your entries, then you can choose to share them. If not, you can choose to keep them in your private area and no other ePortfolio user has access to your private entries. Your Supervisor can sign the **PDP** entry and add a comment, if required; however *you must share an entry first* so that they can view it.

To add a new entry in your **PDP**, click on the **Add New Entry** button. Then complete the free text boxes for your **PDP** entry and click on the **Save** button. Remember to select **Place in the shared area of my ePortfolio** from the drop down box (see below) if you wish your supervisor to be able to see this entry.

**PDP**

To add a new Personal Development Plan entry, fill out the details below and click the "Save" button. Mandatory fields are marked with a *.

Title *

What specific development needs do I have? *
[Tips on writing - click to show/hide]

How will these objectives be addressed?

Timescale

Evaluation and outcome (show how you have achieved your objectives)

Has it been achieved?   ☐

In order for a Supervisor to see this entry, it must be shared.

Private or Shared?   Place in the Shared Area of my ePortfolio ▾

## 2.7 The Forms Menu

You can access the **Forms** section by clicking on the **Forms** menu header. You can access the various electronic forms that are stored in your ePortfolio here.

When completing a form, you have unlimited time to complete the form as long as you are actively typing.  Once you stop typing, you will be logged out after 60 minutes (you will see a pop-up message informing you of this).  If at any point during the 60 minute window you resume typing the 60 minutes clock will be reset.

Depending on your Deanery you may have a different selection of menu items available. Let's take a look at what each menu item is used for:

### 2.7.1   Assessments (TAB)

This page is used to manage your Team Assessment of Behaviour (TAB).

TAB is a screening tool to help identify foundation doctors who may need additional help. It is used early in your foundation training so steps can be taken to reduce the risk of any concerns about your professional practice developing into chronic problems. However, in the great majority of cases, no concerns are identified and TAB confirms good professional behaviour.

You will be told when in your training you are to complete the TAB assessment by your Foundation School.  You may have to complete more than one TAB in a year if your School requires this.

To start the TAB process you will have to begin by selecting the post that you wish to save the TAB against.  You do this using the **Select a post** drop down menu on the Assessments (TAB) page (circled in pink below)

## Assessments (TAB)

There are three ways assessments can be recorded in the ePortfolio:
- Directly from a supervisor's access.
- Directly from the trainee's access.
- Using the "ticket" process to provide access to an assessor who may not have an ePortfolio account or be linked to the trainee.

Further Assessment information can be found in the FAQs page here.

**Assessment Descriptions**
**Team Assessment Behaviour (TAB)** - Read More...
**Self TAB** - Read More...

**Select a post**  FY1 - Queen Margaret and Victoria Hospitals (01 Aug 2012 to 28 Nov 2012) ⌄

### Self TAB

| | Created On | Status |
|---|---|---|
| You have not completed a Self TAB for this post | | Create |

The next step is to complete your 'self TAB', a self assessment form that you must complete before you are allowed to proceed with the rest of the TAB process.   To do this click the **Create** link as indicated above in green.  You will be given the self TAB form to complete, do this and then click **Save.**

**Select a post :**  FY1 - Queen Margaret and Victoria Hospitals (01 Aug 2012 to 28 Nov 2012) ⌄

**Self TAB**

| | Created On | Status |
|---|---|---|
| Self TAB | 01/08/2012 | Complete  🔍 |

**TAB**

Below is a summary of the TAB assessment forms submitted for this post. You must ensure that you gather the required number of submissions for each type of assessor.
A ticket request for an assessor can be created using the 'Create a ticket for your TAB' section at the bottom of this page or via the 'Forms -> Ticket Requests' page.

IMPORTANT: A minimum of 10 assessors TABs must be completed. The colour coded table indicates if the MINIMUM number of appropriate assessor categories have been fulfilled but does not change colour to indicate that the overall number of 10 assessors TABs has been achieved.

Your TAB is **INCOMPLETE**

| | #Req* | Assessor | Ticket Code | Created On | Status |
|---|---|---|---|---|---|
| Doctors (more senior than F2) | 2 | No Tickets or Forms have been created for / by this group of Assessors | | | |
| Senior Nurse (Band 5+) | 2 | No Tickets or Forms have been created for / by this group of Assessors | | | |
| Allied Healthcare Professional | 2 | No Tickets or Forms have been created for / by this group of Assessors | | | |
| Other Team Members | 2 | No Tickets or Forms have been created for / by this group of Assessors | | | |
| | | | Total Tickets (Sent / Pending / Complete) : **0 / 0 / 0** | | |

* This number is the **MINIMUM** number of completed TABS required per assessor category.

**Create a ticket for your TAB**

| Assessor Role | Please Select... ⌄ |
|---|---|
| Assessor Name | |
| Assessor Email | |
| Comments | |
| | Add |

Now you need to gather TAB assessment forms from a pool of colleges that you work with via the ePortfolio ticketing system.  A ticket request for an assessor can be created using the **'Create a ticket for your TAB'** section at the bottom of this page or via the 'Forms -> Ticket Requests' page.

To use the **'Create a ticket for your TAB'** area first select an **Assessor Role** from the dropdown menu, then fill in the Assessor Name and Assessor Email fields.  If you wish to include a comment for the assessor you can ad on in, but it is not mandatory.

See section 2.7.8 below for details of how to use the 'Forms -> Ticket Requests' page.

Your assessors must include:

- At least 2 doctors (including your designated clinical supervisor) but none may be other foundation doctors
- At least 2 nurses (band 5 or senior)
- 2 or more allied health professionals (physiotherapists, OTs, etc); and
- At least 2 others (e.g. ward clerks, postgraduate programme administrators, secretaries, auxiliary staff).

The colour coded table on this page will help you keep track of the tickets you have issued and the assessor mix that you have.

| | #Req* | Assessor | Ticket Code | Created On | Status | |
|---|---|---|---|---|---|---|
| Doctors (more senior than F2) | 2 | Richard, CT/ST1 | gt6628b4mc | 01/08/2012 16:27:59 | Complete | |
| | | tom, Other Consultant | 3azxw8863c | 24/07/2012 15:04:38 | Complete | |
| | | geoff (geoff9889449@geoff.com) | bnfd9pw6tm | 24/07/2012 15:03:55 | Incomplete | X |
| | | dave (dave109982838@dave.com) | 36x5x4d6q7 | 24/07/2012 15:03:29 | Incomplete | X |
| Senior Nurse (Band 5+) | 2 | Harry, Specialist Nurse Sister | 865hya2n7d | 01/08/2012 16:29:12 | Complete | |
| Allied Healthcare Professional | 2 | *No Tickets or Forms have been created for / by this group of Assessors* | | | | |
| Other Team Members | 2 | *No Tickets or Forms have been created for / by this group of Assessors* | | | | |
| | | | | Total Tickets (Sent / Pending / Complete) : **5 / 2 / 3** | | |

A green category indicates that you have fulfilled the requirements for that type of assessor.  In the example above two Doctors have returned the forms so the category has changed to green.

An amber category indicates that ticket requests have been made, but some are pending.

Red indicates that no tickets or forms have been created by that group of assessors.

The individual TAB returns will not be viewable by a trainee.  You will see that the form has been entered into your account, but rather than showing as a blue link, the details will appear as normal text. This is intended as trainees do not have permission to.  Once you have the requisite number of TAB returns (normally 10) your supervisor will be able to release a summary of the TAB forms which will appear at the bottom of the TAB page.

### 2.7.2   Assessments (Core Procedures)

You can view the Core Procedure assessments that have been submitted for your current and previous posts in this page.

A list of the completed forms will appear in a table in the bottom of the page.  To open a form and view its details click on the blue link after the magnifying glass icon (highlighted below).

When a core procedure form is completed it is automatically linked against the relevant curriculum outcome sub-heading.

### 2.7.2.1 Self entered assessment forms

You can also create forms in this section.  It is generally accepted that most forms will be entered into your account via the ticketing system or directly from your Supervisor's ePortfolio, however you are also able to create a form yourself on an assessor's behalf in the unusual circumstance that an assessor is unable to do so themselves.  You should not use this facility to allow others to fill in forms from your own access.  This will log those forms as 'self entered' and they may therefore not count towards your necessary numbers of assessments.

To self create forms in this manner select the 'Add new core procedure' button and click the 'create' link (as indicated on the screenshot below). This will bring up the empty form that can then be completed.



## 2.7.3   SLEs

A SLE is an interaction between a foundation doctor and a trainer which leads to immediate feedback and reflective learning. They are designed to help foundation doctors develop and improve their clinical and professional practice and to set targets for future achievements.

Completed SLEs are collected in a summary page in the ePortfolio.  To open a form and view its details click on the blue link after the magnifying glass icon (highlighted below).

It is generally accepted that most SLE forms will be entered into your account via the ticketing system or directly from your Supervisor's ePortfolio, however you are also able to create a form yourself on an assessor's behalf in the unusual circumstance that an assessor is unable to do so themselves.

To self create forms in this manner select the 'Add new SLE button and click the 'create' link (as indicated on the screenshot below). This will bring up the empty form that can then be completed.



Some foundation Schools or deaneries will not accept SLEs that have been self-entered as counting towards any evidence collection requirements.   Check your local guidelines before entering forms in this manner.

To request an SLE from an external party click the **Ticket Request** button on the SLE page.  This will take you to the ticket requests page that is covered in section 2.7.8.

### 2.7.4   Clinical Supervisor Forms

In this section you will find the forms that record the meetings that you have with your clinical supervisor.

You can view or create forms by clicking the blue link or 'Add new meeting' button in the same way as for assessment forms detailed above in section 2.7.2.

Meeting or Supervision forms are generally entered by a supervisor directly from their log in. Some supervisors may require you to self enter these forms on their behalf, but this should be the exception rather than the rule.



### 2.7.5 Educational Supervisor Forms

In this section you will find the forms that record the meetings that you have with your educational supervisor.



You can view or create forms by clicking the blue link or 'Add new meeting' button in the same way as for assessment forms detailed above in section 2.7.2.

Meeting or Supervision forms are generally entered by a supervisor directly from their log in. Some supervisors may require you to self enter these forms on their behalf, but this should be the exception rather than the rule.

### 2.7.6  Progression/Foundation ARCP

This page is another forms page that will contain progression and ARCP related forms.  It will work in a similar manner to the forms pages detailed in the last few sections.

At the time of writing there are no forms available in this page.  It is envisaged that the form will be made available later in 2012.



### 2.7.7  Target Timeline

In this section you will find a target timeline set up to help you monitor the forms required for your ePortfolio.   The requirements are grouped either by post or by training period.   There is a drop-down menu to select the post that you wish to view the requirements for.

You will see displayed by how many months you have to complete the requirement **from the start of the post/training period not the current date.**  You will see how many forms are required, and also a running total of the forms completed so far.

There is also a status column that displays a red cross when the number completed is lower than the number required.  When the required number is reached the cross changes to a green tick.

| Home | Curriculum and PDP | Forms | Reflection | Additional Achievements | Messages | Help |

Select Role >

## Target Timeline

Below is a timeline for the Assessments/Forms that should be completed and the progress made.

Post: FY1, Royal Infirmary of Edinburgh, 02 Aug 2011 to 07 Dec 2011, General Internal Medicine ▼

| By Month | Requirement | Completed So Far | Status |
|---|---|---|---|
| 4 | 2 x Mini CEX | 2 | ✓ |
| 4 | 2 x CbD | 2 | ✓ |
| 4 | 1 x DOPS | 1 | ✓ |
| 4 | 10 x TAB | 6 | ✗ |
| 4 | 1 x Self TAB | 2 | ✓ |
| 4 | 1 x Initial meeting with Supervisors | 3 | ✓ |
| 4 | 1 x End of Placement review | 0 | ✗ |

Each timeline is defined by the Postgraduate Deanery and implemented by the ePortfolio team.  If your Deanery has yet to contact the ePortfolio team or chosen not to have a timeline set up you will see a message saying "*A Timeline has not been defined for your region yet*".

### 2.7.8   Ticket Requests

You can request an external assessor (from all the 'forms' sections above) by clicking on the **Request External Assessment** button in each forms page.  Requesting an external assessment starts a procedure know as a 'ticket request'.

For example if you wanted to start the process from the 'SLEs section you would click the button as indicated on the screenshot below.  The button is in a similar place on the other 'forms' pages.



Clicking the **Request External Assessment** button takes you to the **Ticket Requests** page as shown below.

You can also access the ticket request page directly from the Forms menu.

By performing a 'ticket request' you are creating a unique code so that an external assessor, *who may not have an ePortfolio account*, can access the system allowing them to complete assessment forms for you in your programme

You can also view previously generated codes by inputting a date range on this page. **Note:** *If you delete a code and the assessor then tries to use it, they will not be able to. You will need to create a new code.*

After clicking on **the Request New Assessment** button, you will need to complete various forms and click on **next** after each section. **Note:** *You are responsible for inputting all of the correct details on the form (however, the assessor will have the opportunity to review and amend any mistakes if necessary).*

Firstly you will have to confirm the post that you are currently participating in before hitting **next**;



Next you need to select which electronic form you wish the external assessor to complete from the list that will appear (as shown below), before clicking **Next** again.

You must complete a self TAB before requesting a TAB.  If you have not filled one in for a given post, you will not be able to request a ticket for a TAB for that post.

If you request a **Core Procedure** you will be asked to specify which procedure from the list you wish the assessor to sign you off for.  Again click **Next** to continue.

| Post *: | FY1 - St John's Hospital (23 Jul 2012 to 30 Nov 2012) |
|---|---|
| Select Forms *: | *You can select multiple forms for one assessor if desired.* |

☐ Team Assessment Behaviour (TAB)
☑ Core Procedures
☐ Direct Observation Of Procedural Skills (DOPS)
☐ Mini-clinical evaluation exercise (mini-CEX)
☐ Case Based Discussion (CBD)
☐ Developing the Clinical Teacher
☐ Induction Meeting with Clinical Supervisor
☐ Initial Meeting with Educational Supervisor
☐ Combined Induction Meeting with Clinical Supervisor & Initial Meeting with Educational Supervisor
☐ Mid-placement review
☐ Clinical Supervisors End of Placement Report
☐ Educational Supervisors End of Placement Report
☐ Mid-year Review

Core Procedure: Select the procedure(s) you would like ticketed:

☐ Venepuncture
☐ Prepare and administer IV medication and injections and fluids
☐ Blood culture (peripheral)

☐ IV Cannulation
☑ Arterial puncture in an adult
☐ IV infusion including the prescription of fluids

The next step is filling out the assessor's details.  Start by inputting their e-mail address, if this address has been used before the other fields will automatically complete.  If the email address is new then you will need to fill in the other fields yourself before hitting **Finish**.

**Generate New Ticket**

To request an assessment from a person who does not have supervisor access to this account on ePortfolio, fill out the form below and click 'Next'. Mandatory fields are marked with a *.

| Assessor Name *: | Joel Smith |
| Assessor Designation / Job Title *: | Trainer |
| | |
| Assessor Location *: | here |
| Comment for assessor: | |
| Send email to assessor? *: | ○No ⦿Yes |

[Previous] [Finish] [Cance

You will then be given a unique login code for your assessor to use (see example below). They need to go to www.nhsePortfolios.org and enter their code in the **Assessors** box to submit their assessment.

30

If you opted to send an e-mail to them, the e-mail contains a direct link (circled) which they can click on. This automatically enters the 10 digit code, taking them straight into the assessment. You alternatively may choose to print this page and give it to your assessor in person.

Home > Forms > Ticket Requests > Generate New Ticket

## Generate New Ticket

The unique login code for the Assessor to use is: **39n5g3424y**

An email has been sent to notifying the assessor of this unique login code.

---------------------- Email Sent To Assessor ----------------------

Dear Joel Smith,

Assessments have been requested for the trainee listed below.

Please use the login code "39n5g3424y" to access these assessments from the ePortfolio home page at http://qa.nhseportfolios.org

The following link will automatically enter this code for you:
http://qa.nhseportfolios.org/Anon/Login/Login.aspx?LoginCode=39n5g3424y

ASSESSMENT DETAILS:

Trainee: Testing QA-found-trainee
Post: FY1 - Royal Infirmary of Edinburgh (01 Apr 2011 to 31 Jul 2011)
Assessments Requested: Core Procedure (IV infusion of blood and blood products)
Assessor: Joel Smith
LoginCode: 39n5g3424y
Trainee Comment:
Trainee Email: 4@qatest.com

Thank you for taking the time to complete these assessments.

If you have any problems then please contact support by emailing ePortfolio Support

Regards,
Testing QA-found-trainee
-------------------------------------------------------------------

[ Ok ]

You can send a repeat e-mail request (if an e-mail was sent initially) if the assessment has not been completed within seven days. The **Send Reminder** link automatically appears next to any tickets that have not been completed within this timeframe. The link will reappear in another seven days if the ticket has still not been completed, enabling you to send a second reminder e-mail.

When the assessor has completed the form they will receive an email to confirm that the form has been saved.

**Note**: *The unique login code will have an expiry date, to ensure assessments are not submitted too long after the actual event.*

## 2.8 The Reflection Menu

You access the **Reflection** section by clicking on the **Reflection** menu header. You can record or review reflective information such as learning opportunities or identify further learning needs.

There are three pages in this menu.  Let's take a look at what each menu item is used for:

### 2.8.1   Reflective Practice

Reflective practice material can be recorded in your portfolio and used as an example of learning development. You can decide if a reflective record is to remain private or you can share it with your supervisors.

Be mindful of the need to ensure confidentiality of individuals involved in the experience: **PATIENT IDENTIFIABLE DATA MUST NOT BE ENTERED INTO YOUR EPORTFOLIO.**

Shared entries are available for supervisors to review and, if they wish, add comments or signatures to.



You can view previous reflection records from this page by selecting the appropriate entry from the list of logs.  You can either click on the record's name to open it and view it in a new page or you can check the **show details** box to view a condensed version of the reflection on this page.

To add a new log click on the **Add New Log** button.  You will see a list of log types to choose from. To select a log, click on the blue name.  For example the link to open a **Reflection on Procedure** is highlighted below.

After selecting a form you will be presented with a form the fill in. After filling in the details of the reflection please note the **Private or Shared?** drop-down box, if you want your supervisor(s) to be able to view your entries then you can choose to share them, or you can keep them private. Your Supervisor can sign the reflection and add a comment, if required; however *you must share an entry first so that they can view it*.

### 2.8.2   Self Appraisals

In this section you will find the Self Appraisal forms that some Deaneries require their trainees to complete.



Again you can view or create forms by clicking the blue link or 'Add new Self Appraisal form' button in the same way as for the Assessment forms detailed above in section 2.7.2.
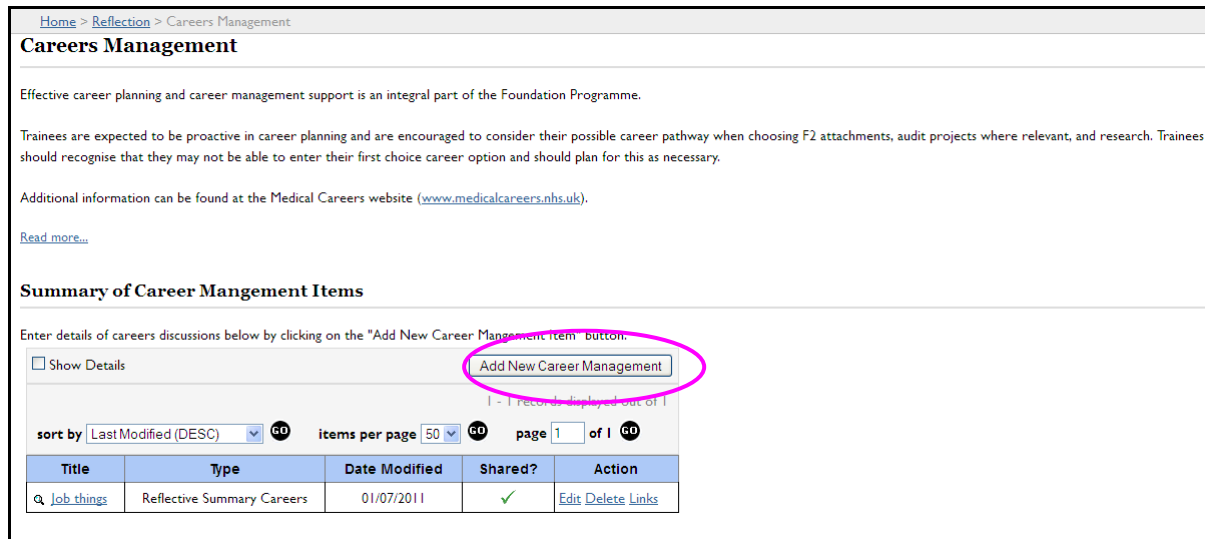
**Note:** Not all deaneries use self assessments forms, so this section may not have as many forms available if you are located in an area that does not require them.

### 2.8.3   Careers Management

This page allows you to keep a record of any career development activity you undergo. This sort of activity can take place in many varied formats, ranging from discussions with supervisors to large events or fairs.

The history of any careers discussions you have should be saved here, *including dates and names of Supervisors who have contributed to the discussion as well as relevant points discussed.*

To save a careers discussion or record of an event start by clicking the **Add New Career Management** button.



This will give a form for you to complete with details of the careers discussion or event.

Once you have filled in the details of the careers discussion, you should click the **Save** button.  You can also discard your entry with the **Cancel** button.

Once saved entries will be displayed in a list on the careers management page.  You can **Edit** or **Delete** entries using the appropriate links in the right hand action column.

## 2.9  The additional achievements menu

This is a new section of the ePortfolio that has been to allow a better organisation of additional achievements not dictated by the core curriculum and to allow the trainee to showcase these as appropriate.

The new pages will allow activities to be recorded and shared, and also linked to curriculum if useful.

As well as a number of pages, two sections have been relocated here from the old 'profile' menu. These two sections are 'Certificates and Exams' and 'Personal Library'.

### 2.9.1    Certificates and Exams

You can add completed certificates here (such as Life Support Certificates). To complete the process, these need to be verified by a Supervisor on their log-in. You can also upload an electronic version of your certificate if you have one. **Note:** The expiration date refers to the date that the certificate expires.

If you are filling in details of an exam you can also include the Expected Exam Date and Exam Passed Date if relevant.

### 2.9.2    Other achievements

This is a section for recording any other achievements that do not fit into any of the other categories in this menu.   It works the same way as demonstrated in the 'Research' section below.

### 2.9.3    Research

This section can be used to record any research-related achievements.



You can view previous additional achievements from this page by selecting the appropriate entry from the list of achievements.  You can either click on the record's name to open it and view it in a

new page or you can check the **show details** box to view a condensed version of the reflection on this page.

To add a new entry click on the **Add New Additional Achievement** button. You will see a list of types to choose from. To select one, click on the blue name. For example the link to open a **Research log** is highlighted below.



After selecting a form you will be presented with a form the fill in. After filling in the details of the achievement please note the **Private or Shared?** drop-down box (circled below), if you want your supervisor(s) to be able to view your entries, then you can choose to share them, or you can keep them private. Your Supervisor can sign the reflection and add a comment, if required; however *you must share an entry first so that they can view it*.

### 2.9.4 Presentations

This is a section for recording any presentations that you give.   It works the same way as demonstrated in the 'Research' section above.

### 2.9.5 Tasters

This is a section for recording any Taster sessions that you attend.

It works the same way as demonstrated in the 'Research' section above, though there has been a special form developed for this area (shown below).



### 2.9.6 Audit

This section can be used to record any audits you complete.   It works the same way as demonstrated in the 'Research' section above.

### 2.9.7 Teaching

This section can be used to record any teaching you deliver.   It works the same way as demonstrated in the 'Research' section above.

### 2.9.8 Non-academic achievements

This section can be used to record any non-academic achievements that don't fit into any of the other additional achievement categories.   It works the same way as demonstrated in the 'Research' section above.

### 2.9.9 Personal Library

You can upload items to your **Personal Library** - these can be scanned paper documents, PDFs, images or other items to include in your ePortfolio. You can choose to share the documents in your **Personal Library** or keep them private. The maximum upload limit per user is 40MB so try to optimize or shrink large files by zipping them, compressing the size of images etc. There are guides to doing this optimization in the **FAQ** section in the **Help** menu.

Certificates uploaded in the **Certificate** section and PDFs generated in the **Download Portfolio** section also count towards your storage limit.

### 2.9.10 Courses and seminars attended

This section can be used to record any face-to-face courses and seminars that you have attended. It works the same way as demonstrated in the 'Research' section above.

This section can also be used to record any e-learning modules that you have completed. Any certificates of completion can be uploaded when the 'Courses and Seminars attended' form is entered. Forms can then be used to demonstrate competence by linking them to the relevant curriculum outcome.

### 2.9.11 Additional Procedures

You can use this section to record any additional practical procedures that you undertake. You may wish to do this to build up an accurate record of all the procedures you undertake in your Foundation Training. This information can be very important for entry into Speciality Training and it is highly recommended that you keep a log of your procedures in this way.

This 'additional procedure' found on this page should not be confused with the core procedures found in the

To add a new log click on the **Add New Procedure** button (see above). This will open a form to fill in which can then be saved by clicking the **Save** button.

**Additional Procedures**

This page is intended as an area for you to record practical procedures that you perform during your foundation training in addition to your 'co[...]
recording a core procedures can be found in the 'Forms' Menu).

Recoding procedures here may be useful to you as an ongoing record of your procedural skills and number of procedures performed. They cou[...]
training post.

To view more guidance select: 🗐 Logbook of Procedures Guidance

☐ Show Details                               Add New Procedure

1 - 2 records displayed out of 2

sort by  Activity Date (DESC)  ▾ **GO**    items per page 50 ▾ **GO**    page 1  of 1 **GO**

| Title | Type | Entered By | Date Modified | Date of Activity | Shared? | Action |
|-------|------|------------|---------------|------------------|---------|--------|
| 🔍 blowing nose | Procedure | Testing QA-found-trainee | 04/07/2011 | 04/07/2011 | ✓ | Edit Delete Links |
| 🔍 Sitting | Procedure | Testing QA-found-trainee | 12/05/2011 | 12/05/2011 | ✓ | Edit Delete Links |

**Procedure**

To add a new Logbook entry, fill out the details below and click the "Save" button.

Date of Procedure       04/07/2011  🗓

Procedure       [_____]

With or without assistance       ○With assistance
                                       ○Without assistance

Comments

In order for a Supervisor to see this entry, it must be shared.

Private or Shared?       Place in the Shared Area of my ePortfolio ▾

[ Save ]  [ Cancel ]

These procedures can be marked as private or they can be shared with your Supervisors.  Shared or unshared it is important that you are mindful that you must ensure confidentiality of any individuals involved in the procedure and should not under any circumstances record any patient data in the ePortfolio.

## 2.10 The messages menu

You access the **Messages** section by clicking on the **Messages** menu header. You can send/receive internal messages regarding ePortfolio.
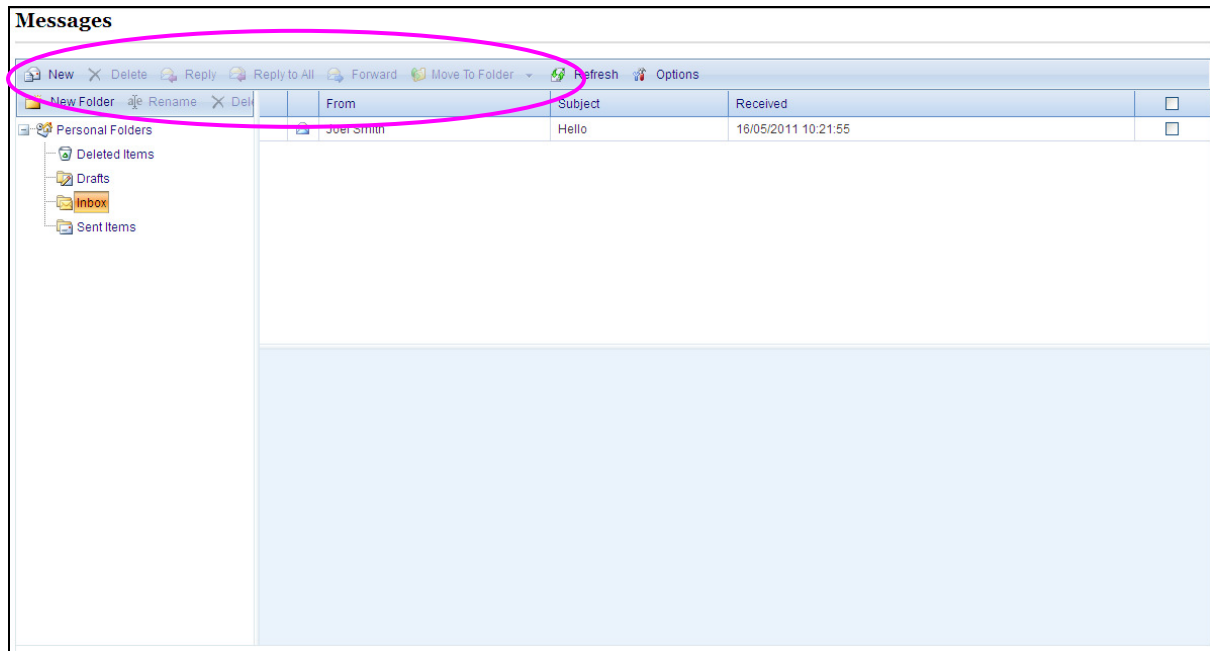


The folders within the **Messages** section are displayed down the left side of the screen. As standard, they consist of **Deleted Items**, **Drafts**, **Inbox** and **Sent Items**. There are three functions available which allow you to manage your **Personal Folders**:

- **New Folder** – this enables you to add a new **Personal Folder**.
- **Rename** – select the new folder you have created and give it an appropriate name.
- **Delete** – select a folder you have created to delete it.

The functions available in the top bar (as shown above) relate to messages:

- **New** – compose a new message to another ePortfolio trainee or Supervisor.

  You can use the Cc (send a copy of the message to someone other than the main recipient) and Bcc (send a copy of the message to someone else, *however it doesn't indicate to the recipient that you sent this copy*) functions and various formatting options within your message. It is also possible to upload attachments, if required, by clicking on the **Attachments** tab.
  **Note:** *All of these functions are also available when replying to or forwarding a message.*

  Click on the **To** link to add a recipient (the Cc and Bcc functions work in the same way).
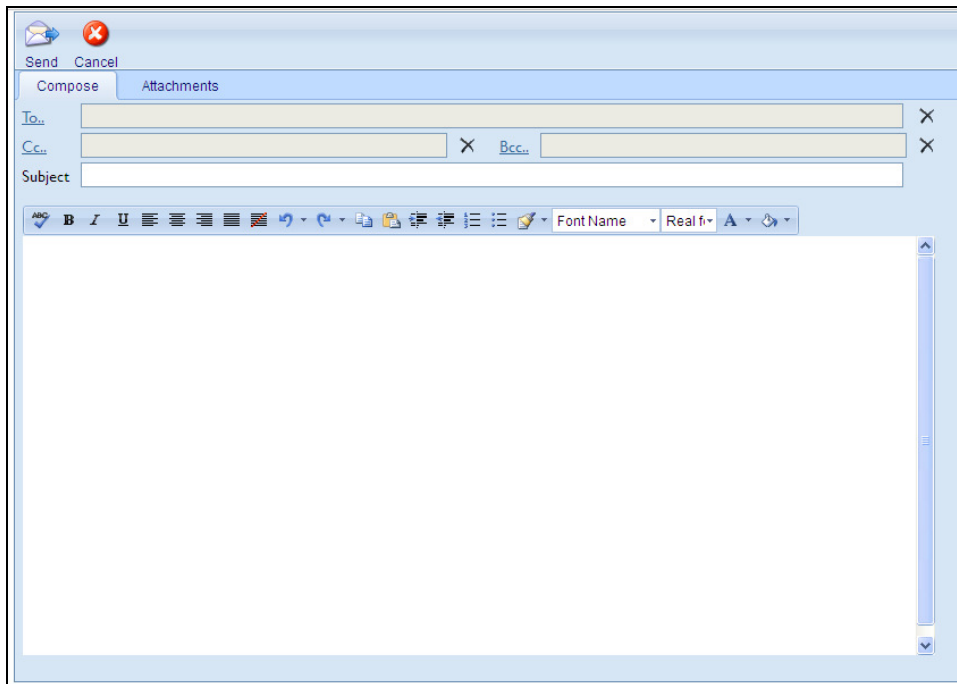
Select your location from the drop down box and click on the **Find Users** button. Supervisors and trainees within your location will be displayed. Select those who you want to send the message to and click on the **Add Recipients** button and then **Finished**. Alternatively you can click on the **User Search** tab to manually search for a specific ePortfolio user.
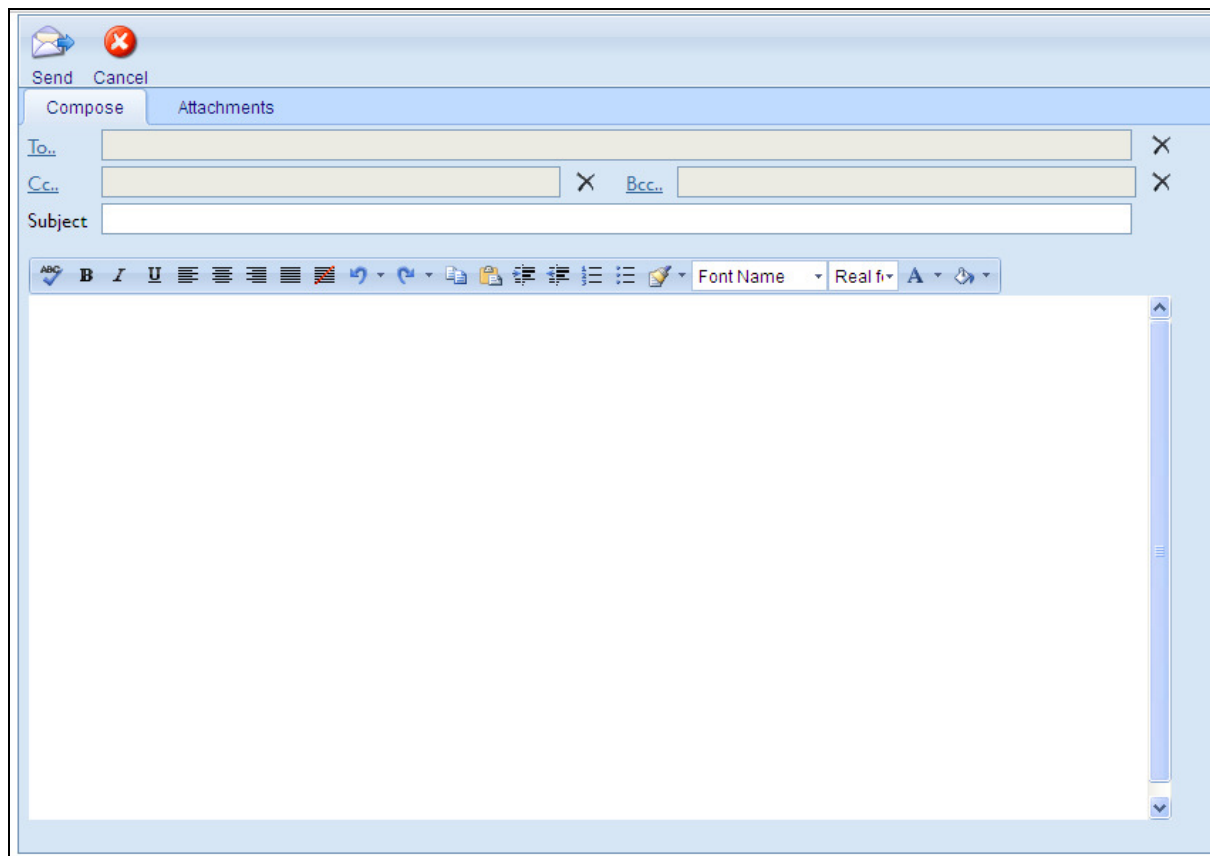
Finally, compose your message and click on the **Send** button.

- **Delete** – select the appropriate message(s) to delete. To delete one message, highlight it and click on the **Delete** button. To delete multiple messages, place a tick in the checkbox next to them and click on the **Delete** button.

- **Reply** - select the appropriate message that you want to reply to and click on the **Reply** button. This will reply to the *sender* only.

- **Reply to All** - select the appropriate message that you want to reply to and click on the **Reply to All** button. This will reply to *everyone* that the message was sent to.

- **Forward** – select the appropriate message that you want to forward on to other trainees/Supervisors within your location and click on the **Forward** button.

- **Move to Folder** - select the appropriate message(s) that you want to move to another folder within your **Messages** section.

## 2.11 The Help Menu

You can access the **Help** section by clicking on the **Help** menu header. You can get help and support information on ePortfolio here.



Let's take a look at what each menu item is used for:

### 2.11.1 Information

The information page is where ePortfolio team, National, Deanery and Local administrators can upload documentation and resources relating to the Foundation Programme and using the Foundation Programme ePortfolio.

### 2.11.2 Access Rights

You can view the access that different roles have within ePortfolio, with regards to viewing trainee information.

### 2.11.3 Frequently Asked Questions

You can browse through the FAQs to see if other people have asked a similar question to you in the past and find out what the answer is. If these do not answer your question, then there is the option to complete and send a form to ePortfolio Support to assist you further.

### 2.11.4 Support

You can submit enquiries to ePortfolio Support if you are having technical problems with your ePortfolio.

Please note, the ePortfolio support page is for technical problems only, such as page errors or missing data.  If you have a problem with your Personal details, Post or Supervisor allocation, please

contact your local administration time.  This also applies if you have forgotten your user name or password.

### 2.11.5  User Guides

You can download a printable User Guide on how to use your ePortfolio.

### 2.11.6  Blank forms

In this section you can view blank forms that are available to you within ePortfolio.  These forms are also printable but are for information purposes only E.g. for taking notes during a clinic:  These forms should not be used to fill out any section of your ePortfolio.  Forms for the e-portfolio should be submitted electronically.

### 2.11.7  About ePortfolio

You can find out more about ePortfolio and how it supports the Foundation Programme.
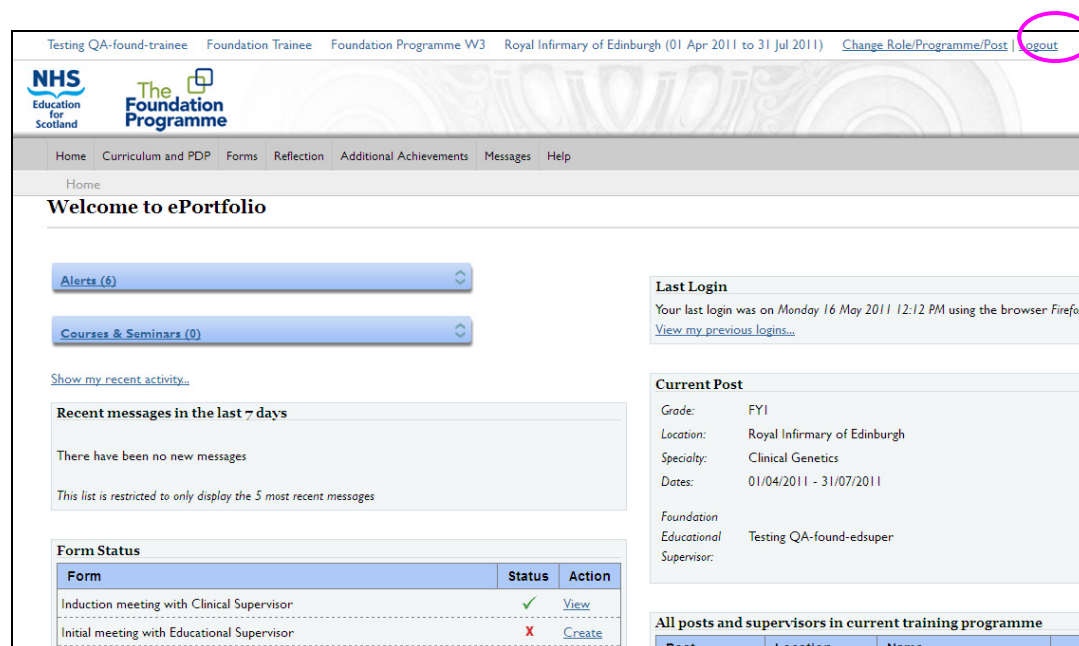
### 2.11.8  Release Notes

You can download the **Release Notes**, which contain details of pending significant and minor updates (and future updates) to the ePortfolio, and the date that these will be released. Additionally, known issues currently affecting ePortfolio are documented.

It is recommended that you read the release notes at least once a month to keep abreast of any changes that may affect your use of the ePortfolio site.

## 2.12 Logging Out

**Always** log out at the end of a session of work to ensure confidentiality. The website is a secure site and will automatically log the user out after a one hour period of inactivity.



To log out click the blue **Logout** link found at the top right of every page in your ePortfolio (circled above).

# 3 Completing your ePortfolio

## 3.1 What is the Foundation ePortfolio?

The e-portfolio has been developed as a learning tool to support your Foundation training. It can be used to record assessments and SLEs, as a tool for reflection and as a record of skills and procedures.

The ePortfolio has been designed to help foundation doctors to plan and manage their Foundation Programme and get the most from the opportunities available. The portfolio is based on the *Foundation Programme Curriculum*.

The Foundation Programme represents a shift to a new learning environment driven by the foundation doctor and supported by supervisors. Within the ePortfolio, foundation doctors will find tools that will help identify educational needs, set goals and plan how to achieve them. The portfolio also contains guidance for foundation doctors on how to demonstrate the competencies they have achieved. The portfolio will become the trainees' record of achievements throughout their foundation training

Your ePortfolio contains information which is essential not only for the Foundation Programme but also for the rest of your career. It is a great resource when it comes to completing application forms for jobs and will provide the necessary evidence for the GMC revalidation process.

### 3.1.1 Further Reading

Read and become familiar with the following:

- Foundation Programme Curriculum – http://www.foundationprogramme.nhs.uk/download.asp?file=FP_Curriculum_2012_WEB_FINAL.PDF

- Foundation Programme Reference Guide - http://www.foundationprogramme.nhs.uk/download.asp?file=Master_FP_Reference_Guide_2012_FINAL_June_2012.pdf

- Foundation Programme supporting Guidance notes http://www.foundationprogramme.nhs.uk/download.asp?file=Supporting_guidance_notes_-_FP_Curriculum_2012.pdf

- The New Doctor  – www.gmc-uk.org

- Good Medical Practice  – www.gmc-uk.org

- The Rough Guide – www.foundationprogramme.nhs.uk

- Help and information guidance on ePortfolio (from the Help drop down menu on the ePortfolio itself)

## 3.2  What to include in your ePortfolio

Your Postgraduate Deanery, Foundation School and Educational Supervisors should provide you with detailed documents telling you what you need to include and when by.  These requirements are different between individual training programmes and it is outwith the scope of this guide to discuss them in detail.

You need to regularly add relevant evidence to your ePortfolio and use it not just as a record of progress but also as a learning tool to encourage the development of good practice. It should provide a structure to prepare for your appraisal meetings with your Supervisor(s) and should be reviewed regularly at your appraisal meetings. This will provide you with the opportunity to find out what relevant information can be collected and how to present it.

Good reflective practice is a core competency of your learning programme and is set out in the curriculum. You can include reflective accounts on both clinical and non-clinical issues. Be mindful of the confidential nature of what you might be writing, do not use actual names of staff, patients or departments.

Refer frequently to the curriculum as it is imperative that you provide evidence against **all** of the competencies listed. Remember that you can link evidence from within your ePortfolio to the curriculum. State whether the competency is covered in one of your work based assessments, by reflective practice, Electronic Continuing Medical Education (ECME) modules, anonymised patient history sheets or anonymised patient discharge summary letters. For more guidance, refer to the competencies in the Foundation Programme Curriculum.

**Note**: *All patient information e.g. photocopied history sheets, discharge summaries etc. must be completely anonymised, including deleting not only patient details but also the name of anyone who has seen the patient on the ward. The GP name and practice address also need to be deleted. There are a number of ways to anonymise data – one is to black out all identification with black marker pen, or block out with correction fluid then photocopy the anonymised original before filing. Alternatively, if the information is on the computer, amend by deleting the identifying information before printing*.

### 3.2.1   Overview of meetings in each placement

**NOTE: If your clinical and educational supervisor is the same person you can combine these meetings.**

**Induction meeting with your clinical supervisor - mandatory**
At the beginning of each placement, you should meet with your clinical supervisor to discuss what learning opportunities are available, what is expected of you and ensure you are familiar with whom (e.g. members of the placement supervision group) and were you'll be working. You should also discuss how to seek clinical help in and out of hours.

**Initial meeting with your educational supervisor - mandatory**
At your first meeting with your educational supervisor you should agree your learning objectives. You'll review these at subsequent meetings. At the end of the each placement and at the end of the year you should use this PDP template to provide evidence that you have met all of the required outcomes and any other outcomes you have set.

Before you meet with your educational supervisor you should consider the outcomes you think you are likely to achieve in your first clinical placement. You should discuss these with your clinical

supervisor and other trainees. Many schools also provide detailed information about the sorts of learning opportunities available in each placement.

**The mid-point review – not compulsory but strongly advised**
This should be conducted by your educational or clinical supervisors approximately half way through the placement. At this meeting you should briefly review progress to ensure your training is on course, that an appropriate number and range of assessments have been undertaken and that you have attended adequate educational opportunities (including supervised learning events - SLEs).

The mid-point review is not mandatory but strongly encouraged, particularly if you or your supervisor has concerns. You and your supervisor should sign the mid-point review form provided.

**The end of placement reviews - mandatory**
There are two end of placement reviews which are conducted at the end of each placement (typically a four month placement):
a) Clinical supervisor's end of placement review
b) Educational supervisor's end of placement review

**a) Clinical supervisors end of placement review**
The clinical supervisor's end of placement review is designed to describe your performance in the workplace. The clinical supervisor should seek and record evidence from colleagues who form the Placement Supervision Group. It is the placement supervision group who are responsible for:
- observing your performance in the workplace
- providing feedback on practice to you
- providing structured feedback to the named clinical supervisor

Using the group's supporting information; the supervisor should meet with you to complete the summative assessment of your overall performance and progress within the placement. This information will be recorded on the Clinical supervisor's end of placement report within the e-portfolio.

**b) Educational supervisors end of placement review**
The educational supervisor's end of placement report draws upon the following areas to provide a judgment about your performance:
- clinical supervisor's report
- the e-portfolio
- engagement in supervised learning events
- attendance at formal educational events
- information from the Placement Supervision Group
- team assessment of behaviour (TAB) feedback
- and any other appropriate sources

Both reviews should examine the assessments and SLEs undertaken and any other evidence and compare them against the objectives that you agreed in the personal development plan at the beginning of the placement.

This review may highlight concerns that have emerged, either through the placement, or where assessments/SLEs have identified specific areas for development. The review form should outline what additional work and assessment are required to address shortcomings in performance during the next placement, including additional assessments and/or SLEs where necessary to substantiate an improvement in performance. This information will be recorded on the Educational supervisor's end of placement report within the e-portfolio.

If significant concerns have been highlighted in the final review form, the foundation training programme director/tutor (FTPD/T) should be informed.

**The mid-year review of progress – not compulsory but strongly advised**
The mid-year review of progress is not mandatory but strongly advised to review satisfactory progression through the programme. This meeting is conducted by your educational supervisor who will review your e-portfolio and review your progress in the Foundation Programme. This is also an opportunity for discussions relating to your personal development and future career planning.

**Educational supervisor's end of year review meeting - mandatory**
End of placement reports are drawn together by the educational supervisor in an end of year report which will inform the ARCP panel's decision regarding satisfactory completion of F1 and F2.
The educational supervisor's end of year report is an overall professional assessment and judgement of the foundation doctor.

### 3.2.2   Programme Timetable and documents

The Foundation Programme follows a cycle that is repeated in each placement. All the documents from each placement will be reviewed.

This is a general scheme.  Any specific instructions from your Deanery or Foundation School will have to be followed.

**NOTE: If your clinical and educational supervisor is the same person you can combine these meetings.**

| Timing | Foundation doctor | Educational supervisor and foundation doctor | Clinical supervisor and foundation doctor |
|---|---|---|---|
| **Recommended, in first week of placement, but must be completed within three weeks of starting placement (mandatory)** | • Sign educational agreement/conditions of taking up a training post (at the beginning of your Foundation Programme) <br> • Sign health declaration (at the beginning of each training year) <br> • Sign probity declaration (at the beginning of each training year) <br> • Review *FP Curriculum* <br> • Complete Personal and Professional Plan (PDP) | • PDP reviewed and completed <br> • Initial meeting form completed | • Review PDP and discuss placement specific objectives <br> • Clinical Supervisor's induction form completed <br> • Establishes members of the Placement Supervision Group |
| Thereafter | • Continue reflective practice <br> • Gather evidence of achievements | | |
| *Mid-point of placement (desirable - with either clinical* | | • ePortfolio reviewed <br> • PDP amended | • ePortfolio reviewed <br> • PDP amended |

| | | | |
|---|---|---|---|
| *supervisor or educational supervisor)* | | • Mid-placement review form completed | • Mid-placement review form completed |
| Thereafter | • Continue reflective practice<br>• Gather evidence of achievements | | |
| **Within last three weeks of placement (Mandatory)** | • Ensure that e-portfolio is up to date. This may include evidence of achievements and demonstration of meeting Curriculum outcomes within that placement. | • Progress reviewed | • Review ePortfolio<br>• Clinical supervisor's report completed |
| **End of placement (mandatory)** – can be undertaken simultaneously *with next placement's initial meeting – both end and initial forms need to be completed*) | • Reflect on achievements and remaining personal and professional development needs. | • Progress reviewed<br>• Educational Supervisors End of placement review form completed | |
| | | | |
| **Mid-year review (desirable)** | • Reflect on achievements and remaining personal and professional development needs. | • ePortfolio reviewed<br>• Mid-year review of progress form completed | |
| | | | |
| **End of year (mandatory)** | • Ensure that e-portfolio is up to date | • Review ePortfolio<br>• Review all Clinical and Educational Supervisor's End of placement reports<br>• Complete F1/F2 End of Year Report | |

At the end of the F1/F2 rotation, all of the above evidence shall be drawn upon by a Foundation Annual Review of Competence Progression (F1/F2 ARCP) panel. The panel will consist of the foundation training director/tutor (FTPD/T) and at least one other, to consider if all requirements for satisfactory F1/F2 sign-off have been met. The panel will complete the F1/F2 ARCP form on that basis.

If the F1/F2 ARCP panel recommends sign off; (for F1) the foundation school director (FSD) will consider issuing Attainment of F1 competence certificate (and for F2) the Postgraduate Dean (or other signatory) will consider issuing the Foundation achievement competence document (FACD)

### 3.2.3 Assessment and SLE numbers during the Foundation Programme

**Required assessments**

| Assessment | Frequency |
|---|---|
| E-portfolio | Contemporaneous |
| Core procedures | Throughout F1 |
| Team assessment of behaviour (TAB) | Once in first placement in both F1 and F2, optional repetition |
| Clinical supervisor end of placement report | Once per placement |
| Educational supervisor end of placement report | Once per placement |
| Educational Supervisor's End of Year Report | Once per year |

### 3.2.4 Supervised learning events during the Foundation Programme

**Recommended minimum number of SLEs from 2012 curriculum**

| Supervised learning event | Recommended minimum number |
|---|---|
| Direct observation of doctor/patient interaction: Mini-CEX DOPS | 3 or more per placement Optional to supplement mini-CEX |
| Case-based discussion (CBD) | 2 or more per placement |
| Developing the clinical teacher | 1 or more per year* |

*Developing the clinical teacher SLE takes place once or more per year, and not once or more per placement as previously stated in some early documentation released by the UKFPO.

# 4 Document History and Acknowledgments

This is version 5.0 of this document and was updated in August 2012 with the 2012 Foundation Curriculum in mind.

This guide was produced by NHS Education for Scotland.

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